CampDoc SchoolDoc

End-of-Year Planning Checklist

A practical tool to help your team reflect, wrap up, and prepare for the next season or school year.

https://support.docnetwork.org

Form Updates & Profile Management

Updating forms while the season is still fresh in your mind helps ensure your health data collection continues to improve.

- [ ] **Review and refine your forms**: While still fresh in your mind, evaluate your current health forms. Identify any critical medical questions missed, remove confusing or redundant fields, and review authorizations that may need to be updated for next year.

> **Tip:**
> Use Builder to review and update your form questions for next year. Reach out to accounts@schooldoc.com (or accounts@campdoc.com) to enable Builder and get a head start on creating and updating your own forms.

- [ ] **Update documentation requirements**: Confirm whether any health documentation requirements have changed (for example, immunization requirements, physical exams, or medication authorization forms).

> **Reflect:**
> Did families struggle to understand documentation requirements this year?

- [ ] **Securely archive participant data**: Save a backup copy of health profiles or key reports for secure recordkeeping.

> **Tip:**
> Run an All Profiles report to save all participant profile data for easy access and compliance archiving later.

System Maintenance & Data Security

Preparing your system now ensures a clean and secure start to the next season.

- [ ] **Review staff access & permissions**: Ensure staff access reflects current roles and responsibilities. Remove access for staff who no longer need to view participant health information.

> **Tip:**
> Run a Provider Permissions report to confirm appropriate access levels

- [ ] **Deactivate accounts for departing staff**: Deactivate provider accounts for staff who will not be returning next year.

> **Tip:**
> Easily deactivate providers in the staff member's profile Users tab.

- [ ] **Manage duplicate profiles**: Review and merge duplicate profiles in your account to prevent confusion and maintain accurate records.

> **Reflect:**
> Are staff entering the same information in multiple places unnecessarily? Use the Profiles List in the List Builder to easily merge two profiles.

Reporting, Reflection, & Risk Management

Taking time to reflect on the year's data and experiences can help identify improvements for next year.

- [ ] **Review illness, injury, and incident trends**: Analyze Health Log data to identify patterns such as frequent injuries during specific activities, seasonal illnesses, or recurring health concerns among students.

> **Tip:**
> Use Health Log Statistics to review incidents by location, disposition, or health condition. Identify any trends and discuss with staff possible ways to reduce common illnesses and injuries.

- [ ] **Review attendance and participation trends**: Look at enrollment numbers, attendance patterns, and participation across programs, sessions, or extracurricular activities.

> **Reflect:**
> Were there peak periods of absenteeism or illness? Are there programs or activities that require additional health support next year?

- [ ] **Debrief and prepare recap reports**: Meet with directors, administrative staff, nurses, and health staff to discuss what worked well and where improvements are needed (for example, health office workflows, communication with families, emergency response procedures, and documentation practices).

> **Tip:**
> Use a combination of List Builder conditions and reporting tools to prepare year-end recap/impact reports for parents and board members.

- [ ] **Prepare health summaries for families (if applicable)**: Some programs may choose to provide families with a summary of participant health office visits or medication records.

> **Reflect:**
> Would families benefit from a summary of their child's health office visits?

Health Protocols & Emergency Preparedness

Ensure emergency protocols are current and understood by staff. Solidify your procedures so you aren't scrambling down the line.

- [ ] **Confirm or update medical protocols**: Review written procedures for receiving, storing, administering, and documenting medications, including clear ownership for field trip days.

> **Tip:**
> Create eMAR Notes Templates to standardize medication documentation.

- [ ] **Review emergency response procedures**: Review and refresh emergency drill procedures, such as severe allergy response, seizure response, asthma emergencies, and building evacuations or lockdown procedures.

> **Tip:**
> Enable the Emergency Plan feature next season to share your organization's plan for communication, evacuation, reunification, and emergency authorities with participants' authorized users.

- [ ] **Review downtime procedures**: Confirm or update clear policies and procedures in the event of a system outage. Determine how these downtime and alternate processes will be communicated to your staff.

> **Tip:**
> Create a Downtime Report containing critical health and emergency contact information to access in the event of emergencies or system outages.

Training & Communication

Training early helps ensure staff are confident and prepared when the next season begins. Preparing communications now will save time later.

- [ ] **Schedule annual training sessions**: Plan training dates for nurses, administrators, and staff who will be using the system. Topics may include health log documentation, medication administration workflows, emergency procedures, or privacy and data security.

> **Tip:**
> Encourage staff to review training resources, including webinars and DocNetwork University courses before the start of the next season or school year.

- [ ] **Prepare communications**: Create or update message templates for common communications, such as back-to-school health reminders, incomplete health forms, medication drop-off instructions, and immunization reminders.

> **Tip:**
> Save commonly-used messages as templates for quick reuse.

- [ ] **Plan summer & back-to-school outreach**: Determine when families should have access to complete health forms before the new season or school year begins.

> **Reflect:**
> Are there missing forms we can prevent next season by launching earlier and giving families more time to complete forms?

Financial & Administrative Planning

Close out the books and set the stage for a smooth return.

- [ ] **Balance your participant ledger**: This ensures that participant balances do not carry over to the next year and enables you to start the next season with a clean slate. There should be no outstanding balances and no pending refunds.

> **Tip:**
> If you use our registration system, export a Participant Ledger financial report to view a full list of all balances, including those who have paid in full, those with an outstanding balance, and those who need a refund.

- [ ] **Review pricing or fee structures (if applicable)**: If your organization charges fees for health services, programs, or trips, confirm that pricing structures are appropriate for next year.

> **Tip:**
> Explore early deposit or payment plan options for tuition, field trips, extracurriculars, or other expenses.

Prepare for the Next Year

A little preparation now can make the transition to the next season much smoother.

- [ ] **Begin planning next year's system setup**: Work with your Client Success Team to confirm timelines for preparing the next season or school year.

> **Tip:**
> Contact your Client Success Manager at accounts@schooldoc.com (or accounts@campdoc.com) if you are ready to get started.

- [ ] **Explore Builder**: If you have not already checked out Builder, explore the training resources and start a draft in your account ahead of time so that you are ready when it's time to adjust your forms for the next season or school year.

> **Tip:**
> Contact your Client Success Manager to learn more about using Builder for form management.